

SuccessWare 21 Online Class Curriculum

The following is a list of the classes that we currently offer our users in an online format. Each of the class consists of the stated number of 90 minute sessions. Users will view the class as a live, internet-based presentation while also connected to a live conference call allowing them to comment and ask questions throughout the course of the class. Many of the classes also include detailed supplemental documentation which is made available for download at the end of the class.

CUSTOMER SERVICE ESSENTIALS

Audience: Call Takers and Dispatchers

Skills Required: Attendee should understand the basics of job processing.

Class Content: This two session class is meant to cover the ins and outs of Call Taking and Dispatch in SuccessWare21. The course is intended for beginner to intermediate users and will include a detailed overview of the call taking/job creation on Day 1. The second session will cover “everything dispatch” as we review the Call Center and all its functions, including tech dispatching, job continuing and rescheduling and more. This is the perfect class for a new CSR or an experience user who wants to hone their skills.

THE JOB PROCESS FROM START TO FINISH

Audience: This class is intended for anyone in the office responsible for maintaining the customer job process in SuccessWare and the managers who want to see the information that can be stored and reported regarding the job flow in SuccessWare.

Skills Required: Attendees should have a basic understanding of customer information and real world job flow.

Class Content: The job process in SuccessWare21 allows you to gather and track enormous amounts of information that can be stored within the customer history as well as the technician's history; all of which can be analyzed through reports.

This 2 day class will focus on identifying and recording that job process information. In addition to information gathering we will also look at how to handle specific circumstances within the job process such as creating job permits, multiple day jobs, split assignments, jobs holding for parts and service jobs which result in as sales quote being delivered to the customer.

Finally we will focus on the reports that allow you to analyze all of the job related data that you have gathered during your processing.

CREATING AND MANAGING AGREEMENTS

Audience: Employees, who research, maintain and process existing customer membership agreements.

Skills Required: Attendee should have a conceptual understanding of billing and renewing customer agreements as well as understanding of basic AR invoice processing.

Class Content: This 2 day class will be covering the creation and administration of Agreements in SuccessWare21. On the first day we will look the options available in building an agreement as well as building templates for agreements to help you to build consistency in their sale. Additionally we will review the sale and activation of agreements as well as the performance of maintenance visits. On day 2 we will cover the numerous useful functions that are available to you in SuccessWare21's Agreement Manager. We will review the numerous filters and searches available as well as the automated functions used to process periodic billings as well as process agreement renewals. We will also look at using the Agreement Manager to find upcoming Visits Due and print mailing labels for postcards that can be sent as reminders to those customers. This class is essential for users who have agreement customers in the system and are looking to streamline their processing.

INVENTORY SETUP

Audience: Employees who will be responsible for the setup and implementation of the inventory process in Successware21.

Skills Required: Attendees should have a basic understanding of the Pricebook and its interaction with General Ledger accounts.

Class Content: In this one-session class, we will examine the general ledger accounts, expense types and adjustment codes that are used for inventory processing. We will setup material and equipment items to be tracked via the inventory module. We will create warehouse locations for inventory, including setup of trucks as warehouses. We will also create stock lists for the different warehouses. In conclusion, we will examine the complete process for activation of inventory, including setting a count date, performing a physical count and activating the general ledger posting.

INVENTORY PROCESSING

Audience: Employees who process daily inventory transactions, maintain inventory stock and complete job costing for AR Invoices

Skills Required: Attendee should be familiar with the layout of inventory as well as the job costing process as it relates to AR Invoices.

Class Content: This 2 session class offers an extensive overview of processes related to the daily processing of Inventory in SuccessWare21. The class is intended for users who have already completed inventory setup and are looking for detailed instruction in its daily maintenance and use. The class will cover the processes involved with “moving” items around in the system as well as a number of special situations such as error correction, vendor refunds and automated purchasing and restocking.

Note that this class does not cover the initial Setup of Inventory in SuccessWare21.

PROJECT MANAGEMENT

Audience: Employees who are responsible for the creation and maintenance of Projects.

Skills Required: Attendees should be familiar with general Project Management terminology. Attendees should also have an understanding of the job creation and flow process within SuccessWare21.

Class Content: This 2 session class will cover the Project Manager and its use in SuccessWare21. The Project Manager, intended for companies performing new construction or long term projects is a powerful tool that allows for the creation of multi-phased jobs, creation of estimates, progress billing, creation of change orders, Work-in-Progress reporting and much more.

If you are using SuccessWare21 and performing this type of work, this class is just what you need!

REPORTS FOR BIGGER PROFITS

Audience: Office Manager and Party responsible for recording Accounts Receivable Invoices.

Skills Required: Attendee should be familiar with Accounts Receivable invoicing as well as the PriceBook.

Class Content: This 1 session class will help you to understand all of the setup and data entry required in order for you to effectively run a number of Invoice and Job related reports in SuccessWare21. This will include coverage of the use of the PriceBook, Employee Timecards, Accounts Receivable Invoices, and the Job Summary form. The class will also include detailed examples of a number of invoice, job and employee related reports.

This class is perfect for the company that is ready to start using SuccessWare21 reports to their full potential

MARKETING AND SALES LEAD TRACKING

Audience: Sales Manager/Sales Dispatcher and Sales Staff / Marketing and Advertising

Skill Level: Attendee should be familiar with the Job Process within SuccessWare21 as well as the process of creating invoices. A basic understanding of the customer record. A working knowledge of Microsoft Word is helpful, but not required.

Class Content: This 2-session class is intended to display the incredible tools available to you in SuccessWare21 as you run customer estimates and follow through on your sales cycle. We will create estimate jobs, build quotes and enter salesperson debriefing information that will serve as the basis for powerful Lead Tracking reports. Additionally, we will explore how to generate new installation jobs based upon Sales jobs as well as copy quote information to invoices, purchase orders and inventory requisitions.

You will learn how to market to customers based upon the service you have performed for them, the equipment that they own or do NOT YET own, even based upon unsuccessful sales calls. Additionally you will learn how to add marketing opportunities to a customer account so that you can market, to that customer, for that reason, whenever you want.

You learn to generate the marketing lists as well as limit which customers remain in the list. Finally you will learn how to produce marketing materials such as mailing labels, marketing letters and call sheets, allowing you to contact directly, the customers most likely to generate you new sales.

THE PRICEBOOK, THE HEART OF SUCCESSWARE ACCOUNTING

Audience: Employees who process AP or AR Invoices, Bookkeepers, anyone involved in the Income or expense related processing.

Skills Required: Attendee should be familiar with general accounting terminology as well as GL account structure.

Class Content: The PriceBook in SuccessWare21 is the engine that makes the whole software go. The PriceBook is a list of EVERYTHING your company sells, purchases and pays for. In this 2-session class you will learn about the role played by the PriceBook in controlling accounting flow as well as in the creation of customer invoices, purchasing, accounts payable and more!

We will begin with an overview of Sale and Expense types, the “pointers” which tell SuccessWare21 where the items you buy and sell should post as revenue and expense in the general ledger.

You will then learn to attach these “pointers” to the items in your PriceBook.

You will learn to add part, labor, and miscellaneous items which can be used in time and material billings as well service as the detail when building flat rate tasks.

You will learn to build and modify flat rate tasks in the PriceBook and learn how the detail in your tasks is used when job costing and running reports.

You will learn to add overhead items which will serve as detail on AP invoices and allow you to run detailed reports on where your company is spending its “overhead” funds.

Finally you will learn to search for and use the PriceBook items created as line item on Customer and Vendor Invoices as well as Purchase Orders. A review of the resulting general ledger audit trail will follow each example.

ACCOUNTS RECEIVABLE OVERVIEW AND SPECIAL SITUATIONS

Audience: Bookkeeper/Staff member who is responsible for maintaining Customer Billing Accounts

Skills Required: Attendees should have a basic understanding of customer billing accounts and receivables terminology, as well as a familiarity with register accounts.

Class Content: This 2 session class is ideal for both those relatively new to Accounts Receivable processing in SuccessWare21 as well as those experienced users looking for methods of handling those “special situations” that arise.

The first session will cover the basics of AR including using the Receivables Manager, recording and allocating payments as well as aging and applying finance charges to accounts. We will also look at Accounts Receivable reports.

The second session will cover more in depth topics such as customer refunds, recording NSF checks, recording and applying customer deposits as well as reconciling AR to the General Ledger.

ACCOUNTS PAYABLE OVERVIEW AND SPECIAL SITUATIONS

Audience: Bookkeeper/Staff member who is responsible for maintaining Vendor Payables Accounts

Skills Required: Attendees should understand basic vendor/AP Invoice processing, as well as be familiar with register accounts.

Class Content: This 2 session class is ideal for both those relatively new to Accounts Payable processing in SuccessWare21 as well as those experienced users looking for methods of handling those “special situations” that arise.

Session 1 will cover the basics of AP including the use of the Payable Manager and the addition of new vendors. We will also look at paying vendor accounts and applying adjustments to their accounts. Finally we will look at aging payables accounts and running a number of AP reports.

Session 2 will concentrate on more in-depth such as Vendor refunds, voiding payments, merging duplicate vendors and reconciling your accounts payable detail to the balance in the General Ledger.

WHERE THE MONEY GOES- MAINTAINING AND PROCESSING THE ACCOUNT REGISTER

Audience: Bookkeepers or anyone else in the business involved in the maintenance of company bank accounts or processing bank related transactions.

Skills Required: A basic understanding of register account structure and cash processing in SuccessWare21.

Class Content: This single session class will identify the essentials of properly processing and maintaining your register accounts.

We will review the process of reconciling your cash box, bank and credit card accounts, as well as making deposits of reconciled funds into your bank accounts. We will also identify the procedures to follow when deposits or reconciliations need to be reversed and edited. Additionally, processing, such as the recording of insufficient funds checks, and maintenance, such as the correction of incorrectly used check numbers will also be covered.

Lastly we will look at recording miscellaneous payments made from both bank and credit card accounts.

MAINTAINING THE GENERAL LEDGER

Audience: This class is intended for company bookkeepers or accountants

Skills Required: Attendees should understand SuccessWare bookkeeping functionality as well as standard accounting terminology.

Class Content: Assuring the accuracy of your financials is essential to properly running your business. This one day session will focus on the things that you can do to properly maintain your General Ledger.

We will review the process of adding and editing General Ledger Accounts, Departments and Fiscal periods as well as review the process of closing and reopening Fiscal Periods.

We will explore the tools available to you in assuring that your General Ledger is in balance to the operational side of SuccessWare21 and compare income reports to the income statement to identify why discrepancies occur. We will also take a look at creating General Ledger Budgets and saving recurring Journal Entries. Finally we will review the numerous financial reports

available to you in SuccessWare21, including General Ledger Transaction reports, the Balance Sheet, Income Statement and your Trial Balance report

YEAR END PROCESSING

Audience: This class is intended for company bookkeepers or accountants

Skills Required: Attendees should understand SuccessWare bookkeeping functionality as well as standard accounting terminology.

Class Content: In this one day session, we will review the steps necessary to reconcile and close the fiscal year. These steps include reconciling AR, AP, Cash and Credit Card accounts and making the necessary journal entries for depreciation and other year end entries as determined by the CPA. This class will focus on completing the normal, monthly, period end processing steps and preparing for the fiscal year end. In addition, we will create the new fiscal year and open it for processing.

SETTING UP AND PROCESSING PAYROLL

Audience: Office Staff responsible for processing payroll and wage related data entry in companies using a Payroll service to pay employees

Skill Level: Attendee should be familiar with the creation of timecard entries in SuccessWare21 as well as their companies' methods accumulating wages and paying employees.

Class Content: This 3 session class will offer coverage of the standard setup and processing of SuccessWare21 payroll for companies that are using a Payroll Service. This will include coverage for the payment of hourly and salaried employees as well as the recording of commissions and other wages such as bonuses or on-call pay.

Two additional 1 session classes are available to offer specific, detailed instruction, related to the setup and processing used by companies that pay employees PieceRate or those that pay employees based upon Billable Hours.

PAYING EMPLOYEES USING BILLABLE HOURS

Audience: Office Staff responsible for processing payroll and wage related data entry

Skill Level: Attendee should have a familiarity with the entry of wages (especially miscellaneous wages) in SuccessWare21 as well as the concept of paying employees using billable hours

Class Content: This 1 session class offers specific instruction related to paying your employees based upon the number of billable hours of labor that they perform during the pay period.

This class is a supplement to the Setup & Processing Payroll Class. Prerequisite for this session:

- ✓ User attended the Setup & Processing Payroll Class, or
- ✓ User has been processing payroll and is familiar with hourly and salaried payroll processing.

PAYING EMPLOYEES PIECERATE

Audience: Office Staff responsible for processing payroll and wage related data entry

Skill Level: Attendee should have a familiarity with the entry of wages (especially miscellaneous wages) in SuccessWare21.

Class Content: This class is intended to offer instruction to companies that pay employees based upon flat dollar amounts or percentage of sale or on a per “activity” basis. This could include pay based upon tasks performed and/or items sold.

This class is a supplement to the Setup & Processing Payroll Class. Prerequisite for this session:

- ✓ User attended the Setup & Processing Payroll Class, or
- ✓ User has been processing payroll and is familiar with hourly and salaried payroll processing.

MANAGING EQUIPMENT AND WARRANTIES

Audience: Members of your organization who are responsible for entering and maintaining customer equipment records and those who manage warranty billings.

Skill Level: Attendee should have a basic understanding of Customer Records, as well as a general understanding of Accounts Receivable Invoicing.

Class Content: This one-day session will provide instruction on the creation and maintenance of equipment and warranty records. The class will also include attachment of equipment to invoices in order to maintain equipment history and charging to both in-house and third party warranties. We will also review several reports concerning equipment and warranties.